

Atty Kruthers, Heather H., of County Counsel's Office (for Petitioner Public Administrator)

(1) First and Final Account and Report of Administrator and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and (3) for Distribution [Prob. C. 9202; 10800; 10810; 10951; 11600; 11850(a)]

DOD: 11/17/2008		PUBLIC ADMINISTRATOR , Administrator appointed by Minute Order dated 10/19/2009, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>Continued from 9/23/2013.</u> Minute Order states Ms. Kruthers requests a continuance to provide notice.
Cont. from 092313		Account period: 10/19/2009 – 7/10/2013	
	Aff.Sub.Wit.	Accounting - \$88,000.00	
✓	Verified	Beginning POH - \$86,000.00	
✓	Inventory	Ending POH - \$10,787.11 (all cash)	
✓	PTC	Administrator - [\$3,520.00] (Note: Statutory fee amount has been interlineated in proposed order to reflect the correct amount.)	
✓	Not.Cred.	Administrator XO - \$1,348.00 (per Local Rule 7.18(B)(1) and (2) for sale of real and personal property; and \$248.00 for preparation of tax returns.)	
✓	Notice of Hrg	Attorney - [\$3,520.00] (Note: Statutory fee amount has been interlineated in proposed order to reflect the correct amount.)	
✓	Aff.Mail W /	Costs - \$511.50 (filing fee \$435.00, certified copies \$76.50)	
	Aff.Pub.	Bond fee - \$220.00 (O.K.)	
✓	Sp.Ntc. W /	Distribution pursuant to intestate succession is to:	
	Pers.Serv.	• ESTATE OF GEORGE FLEMING – \$555.87	
	Conf. Screen	• TOM WHITEHEAD – \$185.29	
	Letters 102209	• ERIC WHITEHEAD – \$185.29	
	Duties/Supp	• BOBBY WHITEHEAD – \$185.29	
	Objections	• SHEILA W. FOSSETT – \$185.29	
	Video Receipt	• MALINDA STEELE – \$185.29	
	CI Report	• JACQUELINE WHITEHEAD HOGAN – \$92.65	
✓	9202	• SEAN WHITEHEAD – \$92.64	
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
✓	FTB Notice		

Reviewed by: LEG
Reviewed on: 10/1/13
Updates:
Recommendation:
File 1 – Fleming

(1) Second and Final Account and Report of Conservator of the Estate and (2) Petition for Allowance of Attorney Fees, and (3) Discharge of Conservator of the Estate

DOD:4-17-13		KATINA SAPIEN LOZANO PAULEY, Conservator with bond of \$60,000.00, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. The First Account, which covered the period 9-19-11 through 9-18-12, was never settled due to numerous listed issues. See prior Examiner Notes from hearings on 4-11-13, 5-2-13 and 7-12-13. On 4-11-13, the Court advised that the Conservator may be removed, and sent notice to the surety re the continued hearing date. On 5-2-13, the Court continued the matter to 7-12-13. However, it appears that at the continued hearing on 7-12-13, it was noted that the Conservatee had passed away (although this happened after the account period that was at issue), and the Court set "status" for the final account to be filed. No action was taken regarding the First Account by the Court or by the Petitioner regarding further addressing the issues. However, the First Account, which covered the period prior to her death, was never addressed and settled by the Court. This Second and Final Account cannot go forward until the First Account has been settled. The Court may require amended account covering the entirety of the conservatorship. <u>Note:</u> Issues noted regarding the first account as filed included inadvertent borrowing from the conservatorship account (mistaken debit card), depositing income to trust rather than conservatorship account, purchase of assets not listed as property of the conservatorship estate, cash withdrawals and disbursements not reflected on schedules, transfers to the trust, attorney fee payment issues, overdraft fees. SEE ADDITIONAL PAGES
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
Note: <i>Petitioner's First Account covering the period of 9-19-11 through 9-18-12, was never settled. See prior Examiner Notes.</i> Second Account period: 9-19-12 through 4-15-13 Accounting: \$29,845.77 Beginning POH: \$25,043.72 Ending POH: \$11,665.03 Final Account period: 4-16-13 through 8-12-13 Accounting: \$20,041.85 Beginning POH: \$11,665.03 Ending POH: \$18,577.10 (\$16,577.10 cash plus personal property valued at \$2,000.00) Conservator: Not requested Attorney (This Second Account): \$3,260.00 Attorney (First Account, not yet authorized): \$4,035.00 Petitioner prays for an order: <ol style="list-style-type: none"> Settling and allowing this account and report and approving and confirming the acts of Petitioner as Conservator; Authorizing payment of attorney fees for this petition and as sought in the First Account; Distribution of the remaining \$9,282.10 to Petitioner as Trustee of the Angelina S. Lozano Living Trust; Authorizing discharge of the Conservator and her bond; For such other orders as the Court deems proper. 			

Page 2

2. Attorney Fees of \$8,874.83 were previously authorized for Attorney Joanne Sanoian pursuant to petition prior to the filing the First Account. Attorney Sanoian then requested fees of \$4,035.00 at the First Account, and this petition requests fees of \$3,260.00.

If approved, attorney fees for this conservatorship estate total \$16,169.73, which is almost half of the original value of the conservatorship estate.

The Court may require further clarification regarding the current and pending fee requests with reference to Probate Code §2640(c) (*just and reasonable compensation*), Cal Rules of Court 7.751 (*best interest of Conservatee*), Cal. Rules of Court 7.752 (*Court may require accounting before allowing compensation*) and Local Rule 7.16, which contemplates \$2,500.00 to establish conservatorship and prepare the first account (assuming account required prior to petition, per 7.752).

3. Petitioner requests distribution of the remaining \$9,282.10 to Petitioner as Trustee of the Angelina S. Lozano Living Trust. Examiner notes that although the Court addressed the existence of a trust at the hearing on appointment of Petitioner as Conservator, it does not appear that Petitioner was ever formally appointed as trustee under proper authority with proper notice.
 - a) The Court may require formal confirmation of Petitioner as Trustee, via separate proceeding with proper notice under applicable law, prior to authorizing further distribution.
 - b) If this petition goes forward, need declaration pursuant to Local Rule 7.12.5 for distribution to trust.

(1) First and Final Report of Executrix and Petition for Its settlement on Waiver of
Account and (2) for Allowance of Statutory Fees to Executrix and Attorney for
Ordinary Services and (3) for Final Distribution

DOD: 07/23/12		DEBBIE M. KORTE , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 09/09/13</u> Minute Order from 09/09/13 states: No appearances. Matter continued to 10/07/13. Daniel McCloskey is ordered to be personally present on 10/07/13. As of 10/01/13, the following remains outstanding: 1. The Petition indicates at Paragraph 16 that the Executor has waived her statutory compensation, however at paragraph 17 the Executor's statutory fee calculation is provided and the prayer requests an order to pay the Executor her ordinary compensation. Need clarification. It is noted that the proposed distribution is with the Executor's fee being paid to her. 2. Decedents will leaves her estate to her children who survive her or to the decedents of any deceased child. Decedent's son, Darrell Ray Pat Frantz, died after the decedent on 08/15/12. Petitioner proposed to distribute Darrell's share to Spencer Frantz, however, since he died after the decedent, his share is distributable to Darrell Frantz' estate and cannot be distributed directly to Darrell's heirs without additional documentation/information.
		Accounting is waived.	
		I & A - \$165,000.00	
		POH - \$17,815.50 (all cash)	
Cont. from 090913		Executor - \$5,740.00 or waived?	
<input type="checkbox"/>	Aff.Sub.Wit.	Executor costs - \$3,129.43 (for expenses paid for house repairs, PG&E, mortgage payment, insurance, utilities)	
<input checked="" type="checkbox"/>	Verified	Attorney - \$5,740.00 (statutory)	
<input checked="" type="checkbox"/>	Inventory	Costs - \$1,255.00 (filing fees, publication, certified copies)	
<input checked="" type="checkbox"/>	PTC	Distribution pursuant to decedent's will, is to:	
<input checked="" type="checkbox"/>	Not.Cred.	Debbie M. Korte - \$478.76	
<input checked="" type="checkbox"/>	Notice of Hrg	William T. Frantz, III - \$478.77	
<input checked="" type="checkbox"/>	Aff.Mail w/	Heidi M. Frantz - \$478.77	
<input type="checkbox"/>	Aff.Pub.	Spencer Frantz - \$478.77	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters 12/04/12		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
Reviewed by: JF			
Reviewed on: 10/01/13			
Updates:			
Recommendation:			
File 3 – Palmer			

**Petition for Probate of Will and for Letters Testamentary; Authorization to
Administer Under IAEA (Prob. C. 8002, 10450)**

DOD: 06/30/2012		TOBY KUNISHIGE HARRISON , daughter, and GERALD L. TAHAJIAN , attorney, named executors without bond are petitioners. Full IAEA – o.k. Will dated: 06/01/2010 Residence: Fresno Publication: The Business Journal <u>Estimated value of the Estate:</u> Real property \$80,000.00 Probate Referee: Rick Smith	NEEDS/PROBLEMS/COMMENTS: The following issues remain: <ol style="list-style-type: none"> 1. Need name and date of death of decedent's spouse pursuant to Local Rule 7.1.1D. 2. Need original will to be deposited with the Court pursuant to Probate Code §8200(a)(1). 3. Will is not self-proving. Need proof of Subscribing Witness. 4. The signature of the petitioner, Toby Kunishige Harrison, appears to be a copy on the petition. 5. Petitioner, Gerald L. Tahajian, did not sign the petition. 6. Need Confidential Supplement to Duties & Liabilities of Personal Representative for petitioner, Gerald L. Tahajian. 7. Need Letters. 8. Need Order. <p><u>Note:</u> The Court will set status hearings as follows. If the appropriate items are filed, the status hearings may be taken off calendar.</p> <p>• Friday, 03/07/2014 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u></p> <p>• Friday, 12/05/2014 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution.</p>	
Cont. from 080813, 091613				
<input type="checkbox"/>	Aff.Sub.Wit.			x
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters	x		
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order	x		
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
Reviewed by: LV				
Reviewed on: 10/02/2013				
Updates:				
Recommendation:				
File 4 – Kunishige				

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 11/03/1973		RUBY VARGAS , daughter, is petitioner and requests appointment as Administrator with bond set at \$2,000.00. Full IAEA – o.k. Decedent died intestate. Residence: Reedley Publication: Selma Enterprise <u>Estimated value of the Estate:</u> Real property - \$10,000.00 Probate Referee: Rick Smith Contest of Appointment of Personal Representative filed on 10/2/13 by Velaire T. Palms. Contestant states she opposes the appointment of Ruby Vargas for the following reasons: a. Ms. Vargas claims that the property taxes have been paid for both lots (7 & 8) however Fresno County records show a tax bill for lot 8 has never been generated. b. Ms. Vargas is incapable of properly executing the duties of office. She is in her early 80's and has bouts with her health. She requires assistance driving and walking. She is also the caregiver for her ailing husband. c. Ms. Vargas has neglected the estate. The home and property have been neglected, there are over grown trees, the landscape and shrubs are dead, rubbish around the house, the house is boarded up and the exterior walls are rotting and weather beaten. Contestant prays that the Court: Deny petitioner's petition for appointment as administrator.	NEEDS/PROBLEMS/COMMENTS: 1. Petition indicates that the fair market value of the real property is \$10,000.00. Therefore bond should be set at \$10,000.00. <u>Note:</u> The Court may question if \$10,000 is the 1973 (date of death) value of the property or the current fair market value. Bond should be set at the current fair market value. <u>For Contestant:</u> 1. Contest was not verified. Probate Code §1021. 2. Contest was not served on the proposed personal representative and all interested parties. <u>Note:</u> If the petition is granted, status hearings will be set as follows: <ul style="list-style-type: none"> Friday, October 11, 2013 at 9:00 a.m. in Department 303, for the filing of the bond. Friday, February 14, 2014 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Friday, November 14, 2014 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.
Cont. from 090913			
<input type="checkbox"/>	Aff.Sub.Wit.		
✓	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail w/o		
✓	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
✓	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Atty Perez, Stephanie M., of Morse, Morse & Morse, Merced (for Petitioner Betty Croll, sister)

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 4/10/2008		BETTY CROLL , sister, is Petitioner and requests appointment as Administrator without bond (<i>Petitioner as sole heir waives bond.</i>) Full IAEA — OK Decedent died intestate. Residence — Fresno Publication — Fresno Bee Estimated value of the Estate: Personal property - \$15,000.00 Total - \$15,000.00 Probate Referee: Rick Smith	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> Court will set status hearings as follows: <ul style="list-style-type: none"> Friday, March 7, 2014 at 9:00 a.m. in Dept. 303 for filing of inventory and appraisal; and Friday, December 12, 2014 at 9:00 a.m. in Dept. 303 for filing of first account and/or petition for final distribution. Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.
Cont. from 092313			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail W/		
<input checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Aff. Posting		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input checked="" type="checkbox"/>	Letters		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: LEG
Reviewed on: 9/18/13
Updates:
Recommendation: SUBMITTED
File 6 - McNalley

Petition for Probate of Will and for Letters Testamentary; Authorization to
Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 8/9/2010		SCOTT SCHARTON , named executor without bond is petitioner.	NEEDS/PROBLEMS/COMMENTS:									
		Full IAEA – o.k.										
Cont. from		Will dated: 9/17/2007										
	Aff.Sub.Wit.	S/P										
✓	Verified		<p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Friday, March 7, 2014 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Friday, December 5, 2014 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>									
	Inventory											
	PTC											
	Not.Cred.											
	Notice of Hrg											
✓	Aff.Mail	W/										
✓	Aff.Pub.											
	Sp.Ntc.											
	Pers.Serv.											
	Conf. Screen											
✓	Letters		<p>Estimated value of the estate:</p> <table> <tr> <td>Annual income</td> <td>-</td> <td>\$ 6,000.00</td> </tr> <tr> <td>Real property</td> <td>-</td> <td><u>\$100,000.00</u></td> </tr> <tr> <td>Total</td> <td>-</td> <td>\$106,000.00</td> </tr> </table> <p>Probate Referee: Rick Smith</p>	Annual income	-	\$ 6,000.00	Real property	-	<u>\$100,000.00</u>	Total	-	\$106,000.00
Annual income	-	\$ 6,000.00										
Real property	-	<u>\$100,000.00</u>										
Total	-	\$106,000.00										
✓	Duties/Supp											
	Objections											
	Video Receipt											
	CI Report											
	9202											
✓	Order											
	Aff. Posting											
	Status Rpt											
	UCCJEA											
	Citation		<p>Reviewed by: KT</p> <p>Reviewed on: 10/1/2013</p> <p>Updates: 10/4/13</p> <p>Recommendation: SUBMITTED</p> <p>File 7 - Uriarte</p>									
	FTB Notice											

Atty Kruthers, Heather H., of County Counsel's Office (for Public Administrator, Successor Trustee)

Status Hearing

DOD: 3/12/2010		JOHN R. PANZAK, JR. , son, served as Trustee of the JOHN ROBERT PANZAK LIVING TRUST dated 11/27/2000 since the Decedent's death in March 2010.	NEEDS/PROBLEMS/COMMENTS:
		Beneficiaries of the Decedent's Will are John R. Panzak, Jr., Gordon Panzak, and the JOHN ROBERT PANZAK LIVING TRUST ; beneficiaries of the JOHN ROBERT PANZAK LIVING TRUST are John R. Panzak, Jr., and Gordon Panzak.	<u>Continued from 8/5/2013.</u> Minute Order states Ms. Kruthers requests a continuance.
Cont. from 070813, 080513			
<input type="checkbox"/>	Aff.Sub.Wit.	Petition for Appointment of Successor Trustee was filed 3/11/2013 by SHARON PANZAK , spouse, stating the Successor Trustee, JOHN R. PANZAK, JR. , died on 2/15/2013, and requesting she be appointed successor trustee.	
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt	Objections to and Opposition to Sharon Panzak's Petition for Appointment of Successor Trustee was filed 4/24/2013 by GORDON PANZAK , claiming the position of successor trustee vested in him no later than 3/18/2013 as the second named successor trustee of the Trust.	
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting	Minute Order dated 4/29/2013 from the hearing on the petition for appointment of successor trustee states the petition is denied as to Sharon Panzak and the Court appoints the PUBLIC ADMINISTRATOR as successor trustee. Order to be prepared.	
<input type="checkbox"/>	Status Rpt	Order Appointing Public Administrator as Successor Trustee was filed 5/22/2013.	
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 10/1/2013
			Updates:
			Recommendation:
			File 8 – Panzak

DOD: 3/28/13		HUGO RICHARD NOROYAN , father, petitioned the court to probate the estate.	NEEDS/PROBLEMS/COMMENTS:
		Patricia English, mother, filed a competing petition to probate the estate.	Minute order does not indicate why this status hearing was set but it may have been to be sure that all documents, communications and phone numbers were provided to Ms. Kruthers as ordered.
Cont. from		<p>On 8/19/13 the court denied both petitions and on its own motion appointed the Public Administrator. Minute Order dated 8/19/13 ordered Mr. Fearnside to gather all documents and communications from Ms. Knapp and provide copies to Heather Kruthers and Ms. Shafer. In addition, Mr. Fearnside was order to provide Ms. Kruthers all necessary telephone numbers including those of Mr. Knapp and Laurie McCloud.</p>	<p>1. Need current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 10/1/13
			Updates:
			Recommendation:
			File 9- Noroyan

10 Sky Ibleeg Xiong (GUARD/P)
 Atty Chang, Kong (pro per Guardian)
 Atty Chang, Choua (pro per Guardian)
 Atty Chang, Tou (pro per Guardian)
 Atty Chang, Joan (pro per Petitioner/mother)

Case No. 08CEPR00626

Petition for Termination of Guardianship

Age: 12 years		JOAN CHANG, mother, is petitioner	NEEDS/PROBLEMS/COMMENTS:
		KONG CHANG, CHOUA CHANG and TOU CHANG were appointed guardians on 11/6/2008 – Choua Chang and Tou Chang consent and waive notice. Kong Chang was served by mail on 8/21/13.	1. Need proof of service of the Notice of Hearing on Ka Zoua Her (maternal grandmother)
Cont. from		Father: YENG XIONG – personally served on 8/21/13	
	Aff.Sub.Wit.		
✓	Verified	Paternal grandfather: Tou Lee Xiong personally served on 8/21/13 Paternal grandmother: unknown Maternal grandfather: Deceased Maternal grandmother: Ka Zoua Her	
	Inventory		
	PTC	Petitioner states she is back in Sky's life and have been taking care of him. The family agrees to terminate the guardianship.	
	Not.Cred.		
✓	Notice of Hrg	Court Investigator Samantha Henson's Report filed on 9/30/13.	
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W/	
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 10/1/2013
			Updates:
			Recommendation:
			File 10 - Xiong

DOD: 12/09/12 Cont. from <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 10%;"></td> <td style="width: 60%;">Aff.Sub.Wit.</td> <td style="width: 30%; text-align: center;">s/p</td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Verified</td> <td></td> </tr> <tr> <td></td> <td>Inventory</td> <td></td> </tr> <tr> <td></td> <td>PTC</td> <td></td> </tr> <tr> <td></td> <td>Not.Cred.</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Notice of Hrg</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Aff.Mail</td> <td style="text-align: center;">w/</td> </tr> <tr> <td></td> <td>Aff.Pub.</td> <td style="text-align: center;">x</td> </tr> <tr> <td></td> <td>Sp.Ntc.</td> <td></td> </tr> <tr> <td></td> <td>Pers.Serv.</td> <td></td> </tr> <tr> <td></td> <td>Conf. Screen</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Letters</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Duties/Supp</td> <td></td> </tr> <tr> <td></td> <td>Objections</td> <td></td> </tr> <tr> <td></td> <td>Video Receipt</td> <td></td> </tr> <tr> <td></td> <td>CI Report</td> <td></td> </tr> <tr> <td></td> <td>9202</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Order</td> <td></td> </tr> <tr> <td></td> <td>Aff. Posting</td> <td></td> </tr> <tr> <td></td> <td>Status Rpt</td> <td></td> </tr> <tr> <td></td> <td>UCCJEA</td> <td></td> </tr> <tr> <td></td> <td>Citation</td> <td></td> </tr> <tr> <td></td> <td>FTB Notice</td> <td></td> </tr> </table>		Aff.Sub.Wit.	s/p	✓	Verified			Inventory			PTC			Not.Cred.		✓	Notice of Hrg		✓	Aff.Mail	w/		Aff.Pub.	x		Sp.Ntc.			Pers.Serv.			Conf. Screen		✓	Letters		✓	Duties/Supp			Objections			Video Receipt			CI Report			9202		✓	Order			Aff. Posting			Status Rpt			UCCJEA			Citation			FTB Notice		RICHARD RAMOS , son/named co-Executor without bond, is Petitioner. Full IAEA – NEED PUBLICATION Will dated 10/11/12 Residence: Clovis Publication: NEED <u>Estimated Value of the Estate:</u> Personal property - \$ 11,500.00 Real property - 142,328.00 Total - \$153,828.00 Probate referee: STEVEN DIEBERT	NEEDS/PROBLEMS/COMMENTS: <ol style="list-style-type: none"> The Petition is marked at item 5(a)(8) that the decedent was not survived by issue of a pre-deceased child; however, decedent's will indicates that she had a pre-deceased child (Judith Martinez) who had issue (April Martinez-Gann & Adam Martinez). Judith Martinez is not listed in item 8 of the Petition. Need date of death of Judith Martinez pursuant to Local Rule 7.1.1D. Predeceased spouse is not named in item 8 of the Petition. Need name and date of death of predeceased spouse pursuant to Local Rule 7.1.1D. Decedent's Will nominates Petitioner to serve as Co-Executor along with James J. Melgoza and Monet J. Melgoza Cornelison. The Petition indicates that Richard Ramos is seeking to be appointed as the sole Executor, therefore need declinations to serve from James J. Melgoza and Monet J. Melgoza Cornelison or revised Petition seeking appointment of all three persons as Co-Executors. Need the relationships to decedent of each person listed in item 8 of the Petition. Note: Petitioner's name and relationship should also be listed in item 8 of the Petition. Need affidavit of publication. <p>Note: If the Petition is granted, status hearings will be set as follows:</p> <ol style="list-style-type: none"> Friday, 03/07/14 at 9:00 am in Dept. 303 for filing of the Inventory & Appraisal; Friday, 12/05/14 at 9:00 am in Dept. 303 for filing of the Accounting/Report of Executor and Petition for Final Distribution <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter, the status hearing will come off calendar and no appearance will be required.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Reviewed by: JF</td> </tr> <tr> <td>Reviewed on: 10/01/13</td> </tr> <tr> <td>Updates:</td> </tr> <tr> <td>Recommendation:</td> </tr> <tr> <td>File 11 - Melgoza</td> </tr> </table>	Reviewed by: JF	Reviewed on: 10/01/13	Updates:	Recommendation:	File 11 - Melgoza
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Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 04/12/13		JEOFFERY SPEER , son, is Petitioner and requests appointment as Administrator without bond.	NEEDS/PROBLEMS/COMMENTS:
Cont. from		Full IAEA - NEED PUBLICATION	
<input type="checkbox"/>	Aff.Sub.Wit.	Decedent died intestate	
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	Residence: Fresno	
<input type="checkbox"/>	PTC	Publication: NEED	
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	Estimated Value of the Estate:	
<input type="checkbox"/>	Aff.Mail	Personal property - \$ 23,500.00	
<input type="checkbox"/>	Aff.Pub.	Real property - 318,393.00	
<input type="checkbox"/>	Sp.Ntc.	Total - \$341,893.00	
<input type="checkbox"/>	Pers.Serv.	Probate Referee: RICK SMITH	
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

1. Petitioner requests appointment without bond. Need waiver of bond from all beneficiaries or bond in the amount of \$341,893.00.
2. The petition indicates that the decedent had a predeceased spouse. Name and date of death of predeceased spouse should be listed in item 8 of the Petition pursuant to Local Rule 7.1.1D.
3. Need the relationships to decedent of each person listed in item 8 of the Petition. Note: Petitioner's name and relationship should also be listed in item 8 of the Petition.
4. Need Notice of Petition to Administer Estate.
5. Need proof of service by mail at least 15 days before the hearing of Notice of Petition to Administer Estate on all persons listed in item 8 of the Petition.
6. Need Affidavit of Publication.
Note: If the Petition is granted, status hearings will be set as follows:
8. Friday, 03/07/14 at 9:00 am in Dept. 303 for filing of the Inventory & Appraisal;
9. Friday, 12/05/14 at 9:00 am in Dept. 303 for filing of the Accounting/Report of Executor and Petition for Final Distribution
Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter, the status hearing will come off calendar and no appearance will be required.
Reviewed by: JF
Reviewed on: 10/01/13
Updates:
Recommendation:
File 12 - Speer

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Age: 14		GENERAL HEARING 12/03/13		NEEDS/PROBLEMS/COMMENTS:	
		CHRISTY CLARK , paternal aunt, is Petitioner.		1. Need <i>Notice of Hearing</i> .	
		Father: ERIC CLINE SR. – <i>Consent & Waiver of Notice filed 09/24/13</i>		2. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Temporary Guardianship</i> or <i>Consent & Waiver of Notice</i> or <i>Declaration of Due Diligence</i> for:	
Cont. from		Mother: ALICIA SUMAYA		- Alicia Sumaya (mother)	
	Aff.Sub.Wit.		Paternal grandfather: DANNY CLINE	3. The UCCJEA is incomplete. Need minor's residence information for the past 5 years.	
✓	Verified		Paternal grandmother: JULIE TURNER –	4. Petitioner indicates the child has Indian ancestry. Therefore, need <u>Notice of Child Custody Proceeding for Indian Child</u> (Form ICWA-030) to be completed and returned to the Probate Clerk's Office as soon as possible . See Probate Code §1460.2, and CA Rules of Court 7.1015.	
	Inventory		<i>Consent & Waiver of Notice filed 09/24/13</i>	The general guardianship hearing on 12/03/13 cannot go forward unless this form has been served on the child's parents; any Indian custodian; any Indian tribe that may have a connection to the child; the Bureau of Indian Affairs (BIA), and possibly the U.S. Secretary of the Interior, by certified or registered U.S. Mail, return receipt requested.	
	PTC		Maternal grandfather: UNKNOWN	A blank copy of the form is in the file for Petitioner, and it should be completed and returned as soon as possible to the Probate Clerk's Office. The Probate Clerk's Office will complete service.	
	Not.Cred.		Maternal grandmother: ROSIE MORALO	At the general hearing on 12/03/13, a continuance may be required to ensure that the appropriate parties and agencies received 60 days' notice. See Probate Code 1460.2, and CA Rules of Court 7.1015.	
	Notice of Hrg	x	Siblings: ERIC CLINE, JR., LUKE CLINE, CALVIN CLINE		
	Aff.Mail		Petitioner alleges that the minor is without a home. Her mother asked petitioner to take her in and she agreed. The father is currently living in a men's group home. There is no other person in the family willing to take her in. Petitioner states that the minor is very behind in school and temporary guardianship is needed so that Petitioner can enroll the minor in school.		
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.	x			
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting			Reviewed by: JF	
	Status Rpt			Reviewed on: 10/01/13	
✓	UCCJEA			Updates:	
	Citation			Recommendation:	
	FTB Notice			File 13 - Cline	

Atty Jackson, Velicia Lee (pro per – maternal aunt/Petitioner)

Petition for Appointment of Temporary Guardian of the Person

Devon, 14	GENERAL HEARING 11/20/13		NEEDS/PROBLEMS/COMMENTS:
Khamile, 6	VELICIA JACKSON, maternal aunt, is Petitioner.		1. Need Notice of Hearing.
Titus, 2	Father: ORLANDO WATSON		2. Need proof of personal service at least 5 court days before the hearing of Notice of Hearing with a copy of the Temporary Guardianship <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:
Cont. from	Mother: BOBBIE JACKSON		- Bobbie Jackson (mother)
Aff.Sub.Wit.	Paternal grandparents: UNKNOWN		- Devon Fisher (minor)
✓ Verified	Maternal grandfather: DELORES JACKSON		- Orlando Watson (father)*
Inventory	Maternal grandmother: BOBBIE JACKSON		*It is unclear if Mr. Watson is the step-father or biological father of any of the children. Need clarification.
PTC	Sibling: MARQAYBEN JONES (18)		
Not.Cred.	Petitioner alleges that the mother is incarcerated and will remain in prison for at least 2 years. The step-father is not the biological father of any of the children and is a violent drug addict. Petitioner states that the children would not be safe in the care of their step-father. Petitioner states that temporary guardianship is necessary in order to provide the children with a safe and stable home.		
Notice of Hrg	x		
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.		x	
✓ Conf. Screen			
✓ Letters			
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Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
			Reviewed by: JF
			Reviewed on: 10/01/13
			Updates:
			Recommendation:
			File 14 – Fisher & Watson